## Raffi Leon George (Estate) Case No. 04CEPR01552

Attorney Simonian, Jeffrey D (Armen L. George – Former Administrator)

Probate Status Hearing RE: Filing of the First or Final Account

DOD: 10/28/2004	LEON Y. GEORGE (Deceased), father,	NEEDS/PROBLEMS/COMMENTS:
	and <b>ARMEN L. GEORGE</b> , brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.	Need First Account or Petition for Final Distribution or current written
Cont. from  Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	Court removes Armen L. George as Administrator and appoints Hrant George as Special Administrator per minute order of 11/30/2015.  Inventory and Appraisal Partial No. 1 was filed on 01/09/2015 indicating real property valued at \$160,000.00 and personal property valued at \$1,500.00.  Final Inventory and Appraisal Partial No. 2 was filed 04/20/2015 indicating	status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served
Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	personal property valued at \$139,728.83  Minute Order of 11/30/2015 set this Status Hearing for the filing of the First or Final Account.  Minute Order states: Mr. Simonian confirms the address used for notice to Armen L. George after speaking with his brother this morning. The Court orders that Armen L George is removed as Administrator forthwith, and the Court appoints Hrant George as Special Administrator with Limited Powers until	<ul> <li>on all necessary parties.</li> <li>2. Need Order of Special     Administration appointing Hrant     George.</li> <li>3. Need Letters of Special     Administration appointing Hrant     George.</li> </ul>
Aff. Posting Status Rpt UCCJEA Citation FTB Notice	01/04/2016. Mr. Simonian is to prepare orders and Letters. No appearance is necessary on 01/04/2016 if the petition is filed at least two Court days prior.	Reviewed by: LV Reviewed on: 12/16/2015 Updates: Recommendation: File 1 - George

# Laney McClellan, Clayton McClellan, Tully McClellan (GUARD/P) Case No. 10CEPR01047

Guardian Carlton, Jennifer (pro per – paternal aunt)
Father McClellan, Lance D. (pro per – Petitioner)

2

**Petition for Termination of Guardianship** 

Laney, 10		LANCE D. MCCLELLAN, father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Clayton, 9		JENNIFER CARLTON, paternal aunt, was appointed guardian of the minors on 01/25/11.  – Consents and waives notice	Need Notice of Hearing.
Tully, 5		Mother: NATOSHA LOGAN	2. Need proof of service by mail at least 15 days
Cont. from		Paternal grandfather: TULLY MCCLELLAN Paternal grandmother: RHONDA MCCLELLAN	before the hearing of Notice of Hearing <u>or</u> Consent & Waiver of
Aff.Sub.Wit.  ✓ Verified		Maternal grandfather: DECEASED  Maternal grandmother: SHELLY CLOWERS	Notice <u>or</u> Declaration of Due Diligence for:
Inventory		Petitioner states [see file].	a. Natosha Logan b. Tully McClellan
PTC Not.Cred.		Court Investigator Dina Calvillo filed a report on 12/21/15.	c. Rhonda McClellan d. Shelly Clowers
Notice of Hrg	Х	J. 12,21, 10.	
Aff.Mail	Χ		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf.			
Screen			
Letters			
Duties/Supp			
Objections			
Video			
Receipt			
✓ CI Report			
9202			
✓ Order			Daviewe d by 15
Aff. Posting			Reviewed by: JF
Status Rpt			Reviewed on: 12/16/15
UCCJEA			Updates: 12/22/15
Citation			Recommendation:
FTB Notice			File 2 - McClellan

- Atty Neilson, Bruce A. (for Janette Courtney Executor Petitioner)
- Atty Dawson, Joanne E. (Pro Per Beneficiary Objector)
  - (1) First and Final Account and Report of Executor and Petition for Its Settlement,
  - (2) for Allowance to Executor and Attorneys for Compensation for Ordinary and Extraordinary Services and for (3) Final Distribution

<b>DOD: 6-9-11</b> JANETTE COURTNEY, Executor with Full IAEA wi bond, is Petitioner.			NEEDS/PROBLEMS/ COMMENTS:
022	nt from 022515, 615, 050715, 615	Account period: 9-15-11 through present  Accounting: \$560,956.26  Beginning POH: \$498,824.07  Ending POH: \$84,654.37 cash (Amount updated per Status Report filed 11/12/15)	Note: Trial on this matter was held on 6/30/15 in Dept. 21. Pursuant to the Court's Ruling After Hearing on Objections
	Aff.Sub.Wit.	Executor (Statutory): \$14,171.36	to First And Final
>	Verified	Attorney Bruce A. Neilson (Statutory): \$14,171.36	Accounting entered
>	Inventory	Attorney Bruce A. Neilson (Extraordinary): \$1,000.00	8/5/15, the objections were overruled except
~	PTC	(for services in connection with the sale of the Visalia	for the claim that
~	Not.Cred.	commercial real property, pursuant to Local Rule	petitioner has failed to
	Notice of	7.18.A.)	properly account for
_	Hrg Aff.Mail	Attorney Scott Ivy (Extraordinary): \$62,049.28	and disclose the bank account held by the
	Aff.Pub.	(for services in connection with the litigation filed against Petitioner and this estate, pursuant to	decedent at the time of
	Sp.Ntc.	declaration and itemization at Exhibit B) <b>Petitioner has</b>	her death at JP Morgan
	Pers.Serv.	already paid said attorney compensation from her own	Chase Bank and/or the
	Conf. Screen	funds and requests reimbursement from the estate.	proceeds of that account withdrawn in
~	<b>Letters</b> 9-15-1	Closing: \$2,500.00	August 2012. The
	Duties/Supp	Petitioner states because there insufficient funds in the	petition was remanded
>	Objections	estate to pay the executor and attorney's fees in full,	to Probate for further
	Video	Petitioner and her attorney will accept a prorated	proceedings consistent with this ruling.
	Receipt	portion of the cash remaining in the estate after the reserve tor taxes and closing expenses is deducted.	wiiii iiiis roiiiig.
	CI Report	Any unused portion of the reserve after the above	Therefore, this matter
<b>Y</b>	9202	payments shall be distributed in equal shares to the	was reset for
~	residuary beneficiaries.		11/16/2015 pursuant to Notice of Hearing
		<b>Distribution pursuant to Decedent's will:</b> Steven Thomas: Real property in Mariposa (specific bequest, distributed per Order on 2/27/15)	Setting, mailed to Attorney Neilson on 10/8/15.
	Aff Posting	Petitioner states after payment of the expenses of administration as set forth above there does not appear to be any remaining cash for distribution to the	SEE ADDITIONAL PAGES
	Aff. Posting Status Rpt	beneficiaries. Any remaining cash assets after closing	Reviewed by: skc Reviewed on: 12/21/15
	UCCJEA	expenses, attorney's fees and executor's fees are paid	Updates:
Citation		will be divided in equal shares to Janette Courtney,	Recommendation:
✓ FTB Notice		David A. Thomas, Joanne E. Dawson, and Sandra L.	File 3 - Drummond
		Thompson.  SEE ADDITIONAL PAGES	
<u>'</u>		<u> </u>	

Page 2

Note: Summary of Objections, etc., has been removed from these Examiner Notes due to the Rulings.

Note: In addition to the above-referenced <u>Ruling After Hearing on Objections to First And Final Accounting</u> entered 8/5/15, Judge Ellison also signed an <u>Order After Hearing</u>, entered 11/12/15, which <u>approves the Petition except as stated</u> (re Chase account) and remands back to the Probate Court for further proceedings.

**Status Report by Attorney filed by Bruce A. Neilson on 11/12/15** states a copy of the Order After Hearing. Also filed concurrently is a Declaration of Janette Courtney concerning the Chase Bank account which was the only matter left undetermined, and a **Supplemental Declaration updating the cash on hand**; also accompanying the declaration is a revised proposed order for distribution in this matter.

<u>Minute Order 11/16/15 states</u>: Matter is continued due to the insufficient notice; Mr. Neilson is to re-notice all parties with the new date.

As of 12/21/15, nothing further has been filed. The following issues remain noted:

#### **NEEDS/PROBLEMS/COMMENTS:**

- 1. Need Notice of Hearing and proof of service of same on all interested parties of this re-set hearing pursuant to applicable code and Notice of Hearing Setting mailed to Attorney Neilson on 10/8/15.
- 2. Declaration of Janette Courtney Regarding Chase Bank Account filed 11/12/15 states this is an account her mother had told her she closed out. She received no statements on this account after her mother's death and believed it to be closed. Upon further inquiry, she received a written response from Chase confirming the account was closed long ago with a zero balance. Attached letter and statement from Chase Bank state the account was closed as of 8/14/12.
  - Based on the above-referenced rulings, the Court may require further information, such as the balance on the decedent's date of death, which was 6/9/11, and accounting for the time between the date of death and the zero balance statement on 8/14/12.
- 3. The revised proposed order submitted by Attorney Neilson appears to contain typos at #3, #6, and #7 on Page 3, and similar typos in the closing paragraph on Page 4. Also, given the above-noted issues, the Court may require further revised order.

Case No. 11CEPR00959

Gonzales, Sandra (pro per – Petitioner)

Petition for Termination of Guardianship

			Petition for Terr
			SANDRA GONZAL
			grandmother/Gu
			She was appointe
			minor on 01/04/12
Со	nt. from		Father: <b>SERGIO G</b>
	Aff.Sub.Wit.		i amon cincio
✓	Verified		Mother: LYDIA RO
	Inventory		Datarnal arandfa
	PTC		Paternal grandfa
	Not.Cred.		Maternal grandfo
	Notice of	Х	ROMERO
	Hrg		Maternal grandm
	Aff.Mail	Χ	D - 1212 11 11
	Aff.Pub.		Petitioner states the released from inc
	Sp.Ntc.		resumed caring for
	Pers.Serv.		resumed calling it
	Conf.		Court Investigator
	Screen		12/11/15.
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
	י וים ואטווכפ		

LES, paternal vardian, is Petitioner. ed Guardian of the 2.

ONZALES

**OMERO** 

ther: SERGIO ANAYA

ather: ARMANDO

nother: MARINA TORRES

he father has been carceration and has or the child.

or filed a report on

#### NEEDS/PROBLEMS/COMMENTS:

- 1. Need Notice of Hearing.
- 2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing or Consent & Waiver of Notice or Declaration of Due Diligence for:
  - a. Lydia Romero (mother)
  - b. Sergio Gonzales (father)
  - c. Sergio Anaya (paternal grandfather)
  - d. Armando Romero (maternal grandfather)
  - e. Marina Torres (paternal grandmother)

Reviewed by: JF **Reviewed on:** 12/17/15 **Updates: Recommendation:** File 4 - Gonzales

Attorney: Randolf Krbechek

First Amended First and Final Account and Report of Executor and Petition for its Settlement for Allowance of Attorneys' Fees' and for Final Distribution

IIS SCHICITICITION AII	owance of Anomeys rees and for final disin	
DOD:		NEEDS/PROBLEMS/COMMENTS:
		Continued to 1/19/16 at the
Cont. from		request of the attorney.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp	_	
Objections		
Video		
Receipt		
CI Report	_	
9202	_	
Order	_	
Aff. Posting	_	Reviewed by: KT
Status Rpt	_	Reviewed on: 12/17/15
UCCJEA	4	Updates:
Citation	_	Recommendation:
FTB Notice		File 5 - Mell

## 6 Mark Carlson Lee (CONS/PE)

Attorney: L. Kim Aguirre (for Conservatee)

Attorney: Heather H. Kruthers (for Petitioner/Conservator of the Person and former Conservator of the

Estate)

## Petition for Appointment of Successor Probate Conservator

Case No. 12CEPR00343

		TEMPORARY EXPIRES 1/4/2016	NEEDS/PROBLEMS/COMMENTS:	
		ILMI ORAKI LATIKLO 1/4/2016	HELDS/TROBLEMS/COMMINICATS.	
Co	ont. from Aff.Sub.Wit.	PUBLIC GUARDIAN, conservator of the person former conservator of the estate, is petitioner and requests MATT BICKEL be appointed as successor Conservator of the Estate with bond.	Petition requests bond but does not include the amount of said bond. Pursuant to Probate Code §2320 bond should be set at \$112,980.00.	
✓ ✓ ✓	Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail W/  Aff.Pub.		2. Need proof of personal service on Conservatee Mark Carlson Lee. (Declaration of Due Diligence filed on 12/16/15 states service was unsuccessful because Atascadero State Hospital will not allow anyone to serve a prisoner or patient at the hospital.  Atascadero will not even tell them if he is a prisoner or patient	
<b>✓</b>	Sp.Ntc. Pers.Serv. Conf. Screen		at the hospital and the legal division at the hospital is not willing to do the service.)	
<b>✓</b>	Letters X Duties/Supp		Notice to several relatives of Mr.     Lee were served at confidential     addresses. Need authority that	
✓	Objections Video Receipt		allows addresses to be confidential in probate matters.	
	CI Report X		4. Need Letters.	
✓	Order			
	Aff. Posting		Reviewed by: KT	
	Status Rpt		Reviewed on: 12/18/15	
	UCCJEA		Updates:	
	Citation		Recommendation:	
	FTB Notice		File 6 - Lee	
-				

Atty Romans, Stephanie N. (pro per – Administrator/Petitioner)

(1) Verified Supplement for First Account and Report of Personal Representative and Petition for Final Distribution (treated as an amendment/supplement to the Request for Waiver of Account and Report of Personal Representative and Petition for Final Distribution)

DOD: 09/24/12	STEPHANIE N. ROMANS, Administrator, is Petitioner.			
	Account period: 09/14/12 - 12/12/14			
Cont. from 092514. 101414 , 041315, 050415, 091415	Accounting - \$310,000.00 Beginning POH- \$310,000.00 Ending POH - \$52,079.74 (all cash)	tl re tl		
Aff.Sub.Wit.  ✓ Verified	Administrator- <b>waived</b>	re 1		
✓ Inventory	Attorney - <b>n/a</b>			
✓ PTC	Costs - <b>\$2,013.50</b>			
✓ Not.Cred. ✓ Notice of Hrg	Administrator reimbursement - \$10,371.66 (funeral expenses) \$1,130.00 (mortgage payments)			
Aff.Mail w/o Aff.Pub. Sp.Ntc.	Richard W. Oh, Sr <b>\$5,122.50</b> (for mortgage payments)			
Pers.Serv.  Conf. Screen	Petitioner states that it was initially the intent of the beneficiaries that the real property assets of the estate were to remain in the family. The parties agreed			
Letters 04/30/13  Duties/Supp Objections	that Nicholas Oh and Jacob Oh would file disclaimers that would allow Stephanie Romans to be the sole heir of the two properties, but Nicholas and	3		
Video Receipt	Jacob would be occupants of the properties. However, there was a verbal agreement between Petitioner,			
CI Report  ✓ 9202  Order ×	Nicholas and Jacob that if the properties were sold, then each beneficiary would receive an equal share of the proceeds. Since the properties were sold, Petitioner proposes to distribute an equal share to Nicholas and Jacob despite the			
	disclaimers they filed.  Distribution, pursuant to intestate succession is to:	5		
Aff. Posting Status Rpt	Nicholas Oh - \$8,360.52	R		
UCCJEA Citation	Jacob Oh - \$8,360.52 Stephanie Romans - \$8,360.52			
✓ FTB Notice	Richie Caleb Oh (minor)- \$8,360.52 (to be placed in a blocked account until the minor reaches age 18)			

#### **NEEDS/PROBLEMS/COMMENTS:**

# CONTINUED FROM 09/14/15 Minute Order from 09/14/15 states: Continued due to the defects listed in the Examiner's notes; Petitioner requests time to research how to cure the items.

## As of 12/16/15, nothing further has been filed and the following notes remain:

- Beneficiaries Nicholas and James
   Oh filed Disclaimers disclaiming
   their share of the estate on
   05/28/13 but Petitioner is now
   requesting to distribute the
   property to them. Need
   clarification. Also, disclaimers
   pursuant to Probate Code 282
   have the effect as if the person
   disclaiming interest had
   predeceased the decedent,
   therefore Nicholas and James'
   share would be distributable to
   their issue.
- Petitioner requests to be reimbursed for costs in the amount of \$2,013.50. Need itemization of these costs.
- 3. Petitioner requests reimbursement for funeral expenses in the amount of \$10,371.66 and mortgage payments in the amount of \$1,130.00, however, no Creditor's Claim was filed and no itemization or further breakdown of the requested reimbursement is provided. Further, a copy of the Supplement for Final Account was not mailed to the beneficiaries which would inform them of the requested reimbursements and the amounts to be distributed. Need itemization of requested amounts.
- 4. Need date of birth for minor beneficiary Richie Caleb Oh.
- 5. Need revised Order.

J. Need tevised Older.		
Reviewed by: JF		
<b>Reviewed on:</b> 12/16/15		
Updates:		
Recommendation:		
File 7 - Oh		

Flanigan, Philip M. (for John T. Laettner – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 01/16/2005	JOHN T. LAETTNER, son, was appointed Executor with	NEEDS/PROBLEMS/COMMENTS:
	full IAEA authority without bond on 01/23/2013.	
		Minute Order of 11/16/2015: If
	Letters issued 01/29/2013.	the petition is not filed by
Cont. from 032814,		01/04/2016, then John T.
033015, 111615	Inventory and Appraisal filed 07/10/2013 shows a	Laettner is ordered to be
	value of \$12,892.00.	personally present in court or
Aff.Sub.Wit.	Startus Dour ant (familia antinan alanta at 02 /20 /001 F) filo al	by CourtCall on 01/04/2016,
Verified	Status Report (for Hearing date of 03/30/2015) filed	and the Court will consider removal on that date.
Inventory	03/09/2015 John T. Laettner needed to be appointed as Executor of the decedent's estate in order to	removal on mai dale.
PTC	receive assets from the ancillary probate in Nebraska.	Need First Account or
Not.Cred.	The sole asset in the Nebraska probate is an interest in	Petition for Final Distribution
Notice of	mineral rights, and these rights have been the subject	or current written status
Hrg	of a quiet title action. The initial trial court ruling on	report pursuant to Local
Aff.Mail	08/06/2013, and the later final "appealable" order	Rule 7.5 which states in all
Aff.Pub.	issued on 01/16/2015, were not in favor of the	matters set for status
Sp.Ntc.	decedent. An appeal has been filed with the	hearing verified status
Pers.Serv.	Nebraska Court of Appeals, case number A-15-00073.	reports must be filed no
	Counsel in the quiet title action estimates that it will be	later than 10 days before
Conf.	approximately six months before a final determination	the hearing. Status Reports
Screen	is made on appeal.	must comply with the
Letters	Wherefore, counsel respectfully requests a one year	applicable code requirements. Notice of the
Duties/Supp	continuance to allow a final determination of the	status hearing, together
Objections	appeal and completion of the ancillary probate	with a copy of the Status
Video	proceeding.	Report shall be served on all
Receipt	processing.	necessary parties.
CI Report	Declaration of Danielle R. Guerrero and Status Report	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
9202	(for hearing date of 11/16/2015) filed 11/13/2015 states	
Order	John T. Laettner needed to be appointed as Executor	
Aff. Posting	of the decedent's estate in order to receive an	Reviewed by: LV
Status Rpt	interest in mineral rights in Nebraska that were the	<b>Reviewed on:</b> 12/16/2015
UCCJEA	subject of a quiet title action. The initial trial court ruling	Updates:
Citation	on 08/06/2013, was not in favor of Mr. Laettner and	Recommendation:
FTB Notice	the appeal filed with the Nebraska Court of Appeals, case number A-1500073, was denied. A petition to	File 8 – Mullennix
	close a no-asset estate has been prepared and	
	counsel is waiting on the receipt of the verification	
	page from petitioner. It is respectfully requested that	
	this matter be continued to 45 days pending the	
	receipt of verification and filing of the petition.	
	<u> </u>	

#### 2013 Walter Edward Eastwood Revocable Trust Case No. 14CEPR00069 9

**Attorney** 

LeVan, Nancy J. (for Susan Brown – Trustee – Petitioner)

Amended First and Final Account of Trustee; Petition for Allowance of Fees for her Attorney; Reimbursement to Trustee for Out of Pocket Expenses Petition; Reimbursement of

Labor and Materials and for Distribution and Termination of the Trust

Cont. from 082615, 093015, 111615  Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Accounting: \$236,090.27  Beginning POH: \$205,417.82  Ending POH: \$111,831.88 (cash)  Trustee (Reimbursement): \$6,211.02  Petitioner states the total amount of deposits made to the trust account by Susan Brown is \$8,450, and Petitioner also paid administrative expenses totaling \$4,161.02.  The revised final distribution amount to each benefit by name. (The propose order provided indicate \$21,214.13 "to the five beneficiaries," which amount does not apper have been revised pursuance of the declaration and the revised final distribution amount to each benefit by name. (The propose order provided indicate \$21,214.13 "to the five beneficiaries," which amount does not apper have been revised pursuance of the declaration and the revised final distribution amount to each benefit by name. (The propose order provided indicate \$21,214.13 "to the five beneficiaries," which amount does not apper have been revised pursuance of the declaration and the revised final distribution amount to each benefit by name. (The propose order provided indicate \$21,214.13 "to the five beneficiaries," which amount does not apper have been revised pursuance of the declaration and the revised final distribution amount to each benefit by name. (The propose order provided indicate \$21,214.13 "to the five beneficiaries," which amount does not apper have been revised pursuance or an account by \$21,214.13 "to the five beneficiaries," which amount of deposits amo	DO	D: 3/21/14	SUSAN BROWN, Trustee with bond of \$74,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:  1. Need revised proposed
Conf. from 082615, 093015, 111615  Aff.Sub.Wit.  ✓ Verified  Inventory  PTC  Not.Cred.  ✓ Notice of Hrg  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Dutles/Supp  Objections  Video  Receipt  CI (Report)  CI (Report)  Aff. Posting  Note CI (Report)  CI (Report)  CI (Report)  Status Rpt  UCCJEA  Citation  FTB Notice  Aff. Posting  Aff. Sub. Wit.  Declaration filed 111/13/15 revises the request for distribution aptown, Cynthia Taylor, Gregory  Aftonice of Hrg  Aff. Posting  Aff. Posting  Aff. Posting  Status Rpt  Citation  FTB Notice  Aff. Posting  Affor Oscaration filed 111/13/15 revises the request for distribution flavore will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory			-	order, which should specify
Trustee (Reimbursement): \$6,211.02  Petitioner states the total amount of deposits made to the trust account by Susan Brown is \$8,450, and Petitioner also paid administrative expenses totaling \$4,161.02.  The amount that has been repaid to Susan Brown during the course of administration is \$5,600.00. The remaining balance owing to Susan Brown is \$6,211.02. Declaration details extensive work required on the residence and the benefit to the estate of such work performed by family, etc.  Pers.Serv.  Conf. Screen  Letters  Dutles/Supp Objections Video Receipt CI Report 97202  ✓ Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice  Trustee (Reimbursement): \$6,211.02 Petitioner states the total amount of deposits made to the trust posuble succent of such work is \$6,211.02. Declaration details extensive work required on the residence and the benefit to the estate of such work performed by family, etc.  Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98. Declaration provides itemization, explanation.  Aff. Posting Status Rpt UCCJEA Citation FTB Notice  Declaration filed 11/13/15 revises the request for distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory			Beginning POH: \$205,417.82	the revised final distribution amount to each beneficiary by name. (The proposed
Inventory		Aff.Sub.Wit.		order provided indicates
made to the trust account by Susan Brown is \$8,450, and Petitioner also paid administrative expenses totaling \$4,161.02.  ✓ Notice of Hrg	<b>&gt;</b>	Verified		· •
Not.Cred.   \$8,450, and Petitioner also paid administrative expenses totaling \$4,161.02. The amount that has been repaid to Susan Brown during the course of administration is \$5,600.00. The remaining balance owing to Susan Brown is \$6,211.02. Declaration details extensive work required on the residence and the benefit to the estate of such work performed by family, etc.    Pers.Serv.		Inventory	•	
Not.Cred.		PTC	•	_ <del></del>
✓ Notice of HrgThe amount that has been repaid to Susan Brown during the course of administration is \$5,600.00. The remaining balance owing to Susan Brown is \$6,211.02. Declaration details extensive work required on the residence and the benefit to the estate of such work performed by family, etc.preliminary distributionsConf. ScreenBuyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.9202Declaration provides itemization, explanation.Aff. PostingAttorney: \$1,500.00UCCJEADeclaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution; reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory		Not.Cred.	<b>■</b> '	-
✓ Aff.Mail       w       \$5,600.00. The remaining balance owing to Susan Brown is \$6,211.02. Declaration details extensive work required on the residence and the benefit to the estate of such work performed by family, etc.         Conf. Screen       Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.         9202       y Order         Aff. Posting       Attorney: \$1,500.00         Status Rpt       Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and aftorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory       Reviewed by: skc    Recommendation:  File 9 - Eastwood	<b>~</b>	Notice of		preliminary distributions.)
Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt  CI Report  9202  Vorder  Aff. Posting  Status Rpt  UCCJEA  Citation  FTB Notice  Aff. Pob.  Susan Brown is \$6,211.02. Declaration details extensive work required on the residence and the benefit to the estate of such work performed by family, etc.  Pers.Serv.  Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.  Declaration provides itemization, explanation.  Aff. Posting  Status Rpt  UCCJEA  Citation  FTB Notice  Citation  FTB Notice  Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory		Hrg		-
Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt  CI Report  Aff. Posting  Status Rpt  UCCJEA  Citation  FTB Notice  Extensive work required on the residence and the benefit to the estate of such work performed by family, etc.  Extensive work required on the residence and the benefit to the estate of such work performed by family, etc.  Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.  Declaration provides itemization, explanation.  Attorney: \$1,500.00  Reviewed by: skc Reviewed on: 12/21/15  Updates: Recommendation:  File 9 - Eastwood  File 9 - Eastwood	<b>&gt;</b>	Aff.Mail \	·   ·	
Sp.Nrc.  Pers.Serv.  Conf. Screen  Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.  Peclaration provides itemization, explanation.  Aff. Posting Status Rpt UCCJEA Citation FTB Notice  Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory		Aff.Pub.	· ·	
Pers.Serv.  Conf. Screen  Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.  P202  Order  Aff. Posting  Status Rpt  UCCJEA  Citation  FTB Notice  Performed by family, etc.  Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.  Declaration provides itemization, explanation.  Attorney: \$1,500.00  Reviewed by: skc Reviewed on: 12/21/15  Updates: Recommendation:  File 9 - Eastwood  File 9 - Eastwood		Sp.Ntc.	· ·	
Conf.   Screen   Buyers: \$3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.   P202		Pers.Serv.		
Letters		Conf.		
Duties/Supp		Screen		
Objections		Letters		
Video Receipt       condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.       Popular Provides itemization, explanation.       Reviewed by: skc       Reviewed by: skc       Reviewed on: 12/21/15         V Order       Aftorney: \$1,500.00       Reviewed on: 12/21/15       Updates:         V CCJEA       Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory       File 9 - Eastwood		Duties/Supp		
Video Receiptto what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.9202Declaration provides itemization, explanation.✓ OrderAff. PostingReviewed by: skcStatus RptAttorney: \$1,500.00Reviewed on: 12/21/15UCCJEADeclaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, GregoryFile 9 - Eastwood		Objections	·	
Receipt		Video		
CI Report       pay the Kirbys an additional \$3,488.98.       Declaration provides itemization, explanation.         ✓ Order       Explanation.       Reviewed by: skc         Status Rpt       Attorney: \$1,500.00       Reviewed on: 12/21/15         UCCJEA       Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory       File 9 – Eastwood		Receipt	•	
✓ Order       explanation.         Aff. Posting       Reviewed by: skc         Status Rpt       Reviewed on: 12/21/15         UCCJEA       Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory       File 9 - Eastwood		CI Report	<b>∥</b> '	
Aff. Posting  Status Rpt  UCCJEA  Citation  FTB Notice  Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory  Reviewed by: skc  Reviewed by: skc  Reviewed on: 12/21/15  Updates:  Recommendation:  File 9 – Eastwood		9202	·	
Status Rpt  UCCJEA  Citation  FTB Notice  Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory  Reviewed on: 12/21/15  Updates:  Recommendation:  File 9 – Eastwood	~		explanation.	
UCCJEA  Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory  Reviewed Oil. 12/21/13  Updates:  Recommendation: File 9 – Eastwood		Aff. Posting	Attornov: \$1 500.00	Reviewed by: skc
Citation  FTB Notice  FTB Noti		•	Anomey: \$1,500.00	
FTB Notice for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory			Declaration filed 11/13/15 revises the request	
distribution, reimbursement to buyers, and attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory				
attorney fees will be \$15,126.37 each to Susan Brown, Cynthia Taylor, Gregory		FTB Notice		File 9 – Eastwood
Susan Brown, Cynthia Taylor, Gregory			· · · · · · · · · · · · · · · · · · ·	
Eastwood, Rebecca Gainson, and Lon  Eastwood, and termination of the trust.			· ·	

Attorney: Elise M. Balgley of Newark, CA (for Petitioner Howard Young)

## Report of Sale and Petition for Order Confirming Sale of Real Property

DO	D: 6/17/13		HOWARD YOUNG			NEEDS/PROBLEMS/COMMENTS:
			limited IAEA authority, is petitioner.			
Co	nt. from 11031	5	Sale price Overbid	-	\$75,000.00 \$79,250.00	Continued from 11/3/15. As of 12/17/15 the following issues remain:
	Aff.Sub.Wit.	5	Reappraisal	_	Need	Need proof of service of the
<b>√</b>	Verified		Property	-	321 S. 38 <sup>th</sup>	Notice of Hearing on buyers Ramir R. Milay and
	Inventory		Street, Richmond	d, CA		Germaine Willkom-Milay
	PTC Not.Cred.		Publication	-	Contra Costa	pursuant to Probate Code §10308(c).
✓	Notice of Hrg		News Register  Buyers		Ramir R. Milay	Proof of service does not indicate that the Notice of
✓	Aff.Mail	W/O	and Germaine V	- Villkom-M	,	Hearing was served with a copy of the petition as
✓	Aff.Pub.		Broker -	\$3,00	0.00 (4% -	required by Probate Code §1252 to Steven Diebert and
✓	Sp.Ntc.	W/O	payable to Prefe Thompson	erred Brok	ers Wanda	Sheryl Noel pursuant to their
	Pers.Serv.		1110111 23011			Requests for Special Notice.  3. Need reappraisal for sale.
	Conf. Screen					Probate Code § 10309(a)(1).  4. #4a of the petition does not
	Letters Course					state the manner of vesting
	Duties/Supp Objections					title. 5. Petition does not address
	Video Receipt					whether or not the funds will be bonded or blocked.
	CI Report					6. Need Order.
	9202					
	Order	Χ				
✓	Aff. Posting					Reviewed by: KT
	Status Rpt					Reviewed on: 12/17/15
	UCCJEA					Updates:
	Citation FTB Notice					Recommendation: File 10A—Young

10A

## Probate Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 6/17/13	HOWARD YOUNG was appointed	NEEDS/PROBLEMS/COMMENTS:
20210/11/10	Administrator with limited IAEA and	
	without bond.	
	=	
	Letters issued on 9/5/14.	
Cont. from 091415,		Need first account, petition for
111615	Inventory and Appraisal filed on 2/13/15	final distribution or current written
Aff.Sub.Wit.	showing the estate valued at	status report pursuant to Local
Verified	\$150,000.00	Rule 7.5 which states in all matters
Inventory		set for status hearing verified
PTC	Minute order dated 7/14/14 set this status hearing re: filing of the first	status reports must be filed no
Not.Cred.	account or petition for final distribution.	later than 10 days before the hearing. Status Reports must
Notice of		comply with the applicable code
Hrg	First account or petition for final	comply min in applicable code
Aff.Mail	distribution is now due.	
Aff.Pub.	T	
Sp.Ntc.	Former Status Report filed 11/03/15	
Pers.Serv.	states: The Estate's sole asset is real property located in Richmond, CA. A	
Conf.	report of Sale and Petition for Order	
Screen	Confirming Sale of the sole asset is now	
Letters	scheduled for 01/04/16. Petitioner is	
Duties/Supp	working with the probate referee to	
Objections	have the necessary updated appraisal of the property completed. The sale is	
Video	being re-noticed taking into account	
Receipt	the value the probate referee has	
CI Report	tentatively placed on the property.	
9202	Petitioner is taking all the necessary	
Order	steps to obtain the highest possible sale	
Aff. Posting	price for the property. Once the sale of	Reviewed by: KT
Status Rpt	the property is concluded, the estate will be in a position to be closed.	<b>Reviewed on:</b> 12/17/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 10B - Young

10B

## Attorney J. Stanley Teixeira (for Conservator Tracy Cerda)

## Probate Status Hearing Re: Filing of the First Account

	TRACY CERDA, daughter, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the Person and Estate with	
	medical consent and dementia powers on	Need first account of the
	8/4/2014.	conservatorship estate, or a
Cont. from	Letters issued 1/23/2015 following filing of an	verified status report and proof of service of notice of
Aff.Sub.Wit.	Amended Order Appointing Probate	the status hearing with a
Verified	Conservator filed 1/22/2015.	copy of the status report to
Inventory	Final Inventory and Appraisal filed 3/17/2015	all interested parties
PTC	shows an estate consisting of all cash in the	pursuant to Local Rule 7.5(B).
Not.Cred.	sum of <b>\$138,878.00</b> .	Note: Due to the delay in filing
Notice of		proof of blocked account, and
Hrg	Pursuant to Probate Code § 2620(a), first	the Letters having issued on
Aff.Mail	account is due 1/23/2016.	1/23/2015, the first account is not yet due pursuant to Probate
Aff.Pub.	Minute Order dated 8/2/2014 from the	Code § 2620(a). Continuance
Sp.Ntc.	hearing on the petition for appointment set	of this status hearing may be
Pers.Serv.	this status hearing on 1/4/2016 for the filing of	necessary to allow additional
Conf.	the first account of the conservatorship.	time for filing of the first
Screen	Charles Dan and file of here I Characters Tairesian	account.
Letters	Status Report filed by J. Stanley Teixeira 12/23/2015 states:	
Duties/Supp		
Objections	Tracy Cerda, who was appointed	
Video	conservator of the person and estate on	
Receipt	8/4/2014, has reported to him that she	
CI Report	has been ill and unable to provide and	
9202	deliver documents to his office needed	
Order	for the accounting;	
Aff. Posting	It is his hope to have all documents and	Reviewed by: LEG
Status Rpt	the accounting filing within 30 days from	<b>Reviewed on:</b> 12/16/15
UCCJEA	the date of the originally scheduled	<b>Updates:</b> 12/28/15
Citation	accounting.	Recommendation:
FTB Notice		File 11 – Andrade
		11

12 Jasean Bess & Jashaya Sumlin (GUARD/P) Case No. 14CEPR00806

Petitioner Bess, Jezell (Pro Per – Mother – Petitioner)

Guardian Bess, Courtney Lynn (Pro Per – Maternal Aunt – Guardian of Jasean)
Guardian Robinson, Breshia (Pro Per – Maternal Great-Aunt – Guaridan of Jashaya)

#### **Review Hearing**

	keview nealing	
	COURTNEY LYNN BESS, Maternal Aunt, was	NEEDS/PROBLEMS/COMMENTS:
	appointed guardian of Jasean, and  BRESHIA ROBINSON, Maternal Great-Aunt,	
	was appointed guardian of Jashaya, on	
	12/3/14.	
Aff.Sub.Wit.	On 9/15/15, <b>JEZELL BESS</b> , Mother, filed a	
Verified	Petition for Visitation, which was heard on	
Inventory	10/26/15.	
PTC	BRESHIA ROBINSON filed an Objection to	
Not.Cred.	the petition on 10/19/15.	
Notice of		
Hrg	Minute Order 10/26/15 states: The Court	
Aff.Mail	orders that Breshia Robinson not allow Jashaya to call her "Mom." The Court	
Aff.Pub.	orders supervised visitation for Jezell Bess	
Sp.Ntc.	with both minors, supervised by the	
Pers.Serv.	respective guardians, on Wednesdays and	
Conf.	Fridays from 5pm to 7pm at the Chuck E.	
Screen	Cheese on Blackstone and Nees starting on	
Letters	10/28/15. If Jezell Bess is more than 15 minutes late for any visit, then she loses that	
Duties/Supp	visit, and she is to provide 48 hours notice to	
<u>Objections</u>	the guardians should she be unable to	
Video Receipt	come to a visit. On 11/27/15 and 12/25/15,	
CI Report	the visits shall be from noon to 5pm, not at	
9202	a restaurant but at a mutually agreed upon location. Parties may mutually agree	
Order	as to different days and times for the visits.	
Aff. Posting		Reviewed by: skc
Status Rpt	Declaration filed 12/28/15 by Jezell Bess,	Reviewed on: 12/21/15
UCCJEA	Mother, states she feels like the court didn't	<b>Updates:</b> 12/28/15
Citation	do a good job about the CPS case. Ms.  Bess would like the court to review the case	Recommendation:
FTB Notice	order please. Attached is a confidential	File 12- Bess & Sumlin
	DSS report dated 10/26/15.	
	·	

Attorney Melvin M. Richtel (for Crystal A. Nunes, Executor)

Probate Status Hearing Re: First and/or Final Accounting

	Trobate states fleating ke. This ana/or find	
DOD: 4/30/2014		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR
Cont. from		Waiver of Accounting and
Aff.Sub.Wit.		Petition for Final Distribution filed
Verified		12/11/2015 is set for hearing on
		2/3/2016.
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		<b>Reviewed on:</b> 12/16/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13- Phelps

## 14A Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)

Case No. 15CEPR00122

Petitioner Alvarez, Chantelle (Pro Per – Aunt – Petitioner)

Petition for Termination of Guardianship

		reliiion for termination of Guardianship	
		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
	nt'd from: 1915		Page A - Petition for Termination of Guardianship with Tennison Finney, Step-Mother.
	Aff.Sub.Wit.		Page B - Petition for
>	Verified		Guardianship with
	Inventory		Chantell Alvarez,
	PTC		Paternal Aunt.
	Not.Cred.		
>	Notice of		
	Hrg		
>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt	4	
<b>&gt;</b>	CI Report	4	
<b>&gt;</b>	Clearances	4	
<b>&gt;</b>	Order	4	D. C. Liller
-	Aff. Posting	-	Reviewed by: skc
	Status Rpt	_	Reviewed on: 12/22/15
	UCCJEA	_	Updates:
-	Citation FTB Notice	=	Recommendation: File 14A - Finney
L	FID NOTICE		riie 14A - rifffley

14A

## 14B Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)

Case No. 15CEPR00122

Petitioner Alvarez, Chantelle (Pro Per – Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

		Petition for Appointment of Guardian of the Pe	erson
		See petition for details.	NEEDS/PROBLEMS/
			COMMENTS:
Cont'd from: 1019	15		
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of			
Hrg			
✓ Aff.Mail	W		
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	W		
✓ Conf.			
Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video			
Receipt			
✓ CI Report			
✓ Clearances			
✓ Order			
Aff. Posting			Reviewed by: skc
Status Rpt			<b>Reviewed on:</b> 12/22/15
✓ UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 14B - Finney

14B

Attorney

Bruce, Daniel A. (for Robert Baker – Administrator)

#### Order to Show Cause – Pre RE: Failure to File the Inventory and Appraisal

DO	D: 01/13/15		ROBERT BAKER, son, was appointed	NEEDS/PROBLEMS/COMMENTS:
			Administrator with no IAEA authority	
			and without bond on 06/08/15. Letters	<ol> <li>Need Inventory &amp; Appraisal.</li> </ol>
			of Administration were issued on	
	nt. from		06/22/15.	
	Aff.Sub.Wit.		Ation to Order from begring on 0//00/15	
			Minute Order from hearing on 06/08/15 set the matter for a Status Hearing	
	Verified		regarding filing of the Inventory &	
	Inventory	Χ	Appraisal on 11/19/15.	
	PTC			
	Not.Cred.		Minute Order from hearing on 11/09/15	
	Notice of		states: NO APPEARANCES – The Court	
	Hrg		issues an Order to Show Cause to	
	Aff.Mail		Daniel Bruce as to why he should not	
	Aff.Pub.		be sanctioned for failure to appear, and to Robert Baker as to why he	
	Sp.Ntc.		should not be removed as Administrator	
	Pers.Serv.		for failure to file the Inventory &	
	Conf.		Appraisal. Mr. Bruce and Robert Baker	
	Screen		are both ordered to be personally	
	Letters		present in court or via CourtCall on	
	Duties/Supp		01/04/16.	
	Objections		Clerk's Certificate of Mailing attached	
	Video		to 11/09/15 Minute Order states that a	
	Receipt		copy of the 11/09/15 Minute Order was	
	CI Report		mailed to Daniel Bruce and Robert	
	9202		Baker on 11/09/15.	
	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			<b>Reviewed on:</b> 12/17/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 15- Richardson

Petitioner Anthony McCurn, Sr. (Pro Per)

## Petition for Appointment of Probate Conservator of the [Estate only]

	Petition for Appointment of Probate Conservator of the [Estate only]				
			ANTHONY McCURN, SR., spouse and	NEEDS/PROBLEMS/COMMENTS:	
			Conservator of the Person appointed on		
			4/16/2015, is Petitioner and requests	Note: Petitioner was appointed	
			appointment as Conservator of the	Probate Conservator of the	
			Estate without bond, and with Probate	Person with medical consent	
Со	nt. from		Code § 2590 powers.	powers on 4/16/2015.	
	Aff.Sub.Wit.		Code 3 2070 powers.	powers on 4, 16, 2013.	
				Court Investigator Advised Rights	
✓	Verified			_	
	Inventory		. Diagrap and Datition for dataile	on 12/11/2015.	
$\vdash$			~Please see Petition for details~		
	PTC			Need proof of service by mail	
	Not.Cred.			of the Notice of Hearing with	
1	Notice of		_,	a copy of the Petition for	
`	Hrg		~Please see additional page~	Appointment of Probate	
	Aff.Mail	W/		Conservator showing notice	
✓	All.Muli	**/		was mailed at least 15 days	
	Aff.Pub.			before the hearing for <b>DEDRIC</b>	
	Sp.Ntc.			CHERRY, grandchild, pursuant	
	Pers.Serv.			to Probate Code § 1822(b)(2),	
✓	reis.seiv.			who is listed in Attachment 11	
/	Conf.			but who is not listed on the	
`	Screen				
	Letters			Proof of Service by Mail filed	
✓	reliels			11/23/2015.	
1	Duties/Supp			~Please see additional page~	
È				ricuse see additional page	
	Objections				
1	Video	Filed			
L	Receipt	4/8/15			
1	CI Report				
Ě	-				
	9202				
✓	Order				
	Aff. Posting			Reviewed by: LEG	
	Status Rpt			<b>Reviewed on:</b> 12/16/15	
	UCCJEA			<b>Updates:</b> 12/21/15	
1	Citation			Recommendation:	
	FTB Notice			File 16- McCurn	
				1/	

## 16 Additional Page, Sharon K. McCurn (CONS/PE) Case No. 15CEPR00221

**Petitioner requests** the Court grant Probate Code § 2590 powers in order to obtain a loan modification on the family residence held in joint tenancy pursuant to Probate Code § 2591, due to the loss of his wife's income when she became disabled and reduction of Petitioner's work hours, making it difficult for the household to keep up with the mortgage payment.

**Petitioner additionally requests** that the Court waive an (a) inventory and appraisal; and (b) accountings as long as the estate meets the requirements of Probate Code § 2628.

Court Investigator's Report was filed 12/18/2015.

#### NEEDS/PROBLEMS/COMMENTS, continued:

- 2. Attachment 1(c) to the Petition states the Petition is for a small estate and therefore, no bond is required. Bond is required pursuant to Probate Code § 2320 and CA Rule of Court 7.207. Probate Code § 2321 provides the Court may not waive bond without a good cause determination that the Conservatee will not suffer harm as a result of the waiver. Probate Code § 2323 provides the Court may dispense with the requirement of a bond if it appears likely that the estate will satisfy the conditions of § 2628(a) for waiver of accountings based on receipt of public benefits payments. If Court does not waive bond, need Petitioner to post bond of ~\$9,600.00.
- 3. Need Attachment 3(i) to proposed letters containing the same language contained in Attachment 29 of the proposed order, granting the very specific authority to apply for and obtain loan modifications on the family residence in an attempt to reduce the risk of foreclosure.

**Note:** Petitioner requests the Court waive an inventory and appraisal. Probate Code § 2610(a) provides that within 90 days after appointment, the conservator shall file an inventory and appraisal of the estate made as of the date of the appointment of the conservator. If appointed as conservator of the estate, Petitioner is required to file with the Court an inventory and appraisal within 90 days after appointment.

**Note:** If Petition is granted, Court will set status hearings as follows:

- Thursday, February 11, 2016 at 9:00 a.m. in Dept. 303 for filing proof of bond, if Court requires bond;
- Thursday, May 12, 2016 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and
- Thursday, March 17, 2017 at 9:00 a.m. in Dept. 303 for filing of first account of the conservatorship, if Court requires accountings.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

17 Henry Garcia Padilla (Estate) Case No. 15CEPR00285

Petitioner Padilla, Henry Michael, Jr. (Pro Per – Son – Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA

(Prob. C. 8002, 10450)

	D. 10/7/14		HENDY MICHAEL DADIUA ID Care la	NIFEDS (DDODLEAGS (COAAAENTS
סם	D: 12/7/14		HENRY MICHAEL PADILLA, JR., Son, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner and requests appointment as Administrator with Full IAEA without bond.	Continued from 5/4/15, 7/20/15
			Administrator with full IAEA Without bond.	Continued from 5/4/15, 7/20/15,
			All heirs waive bond.	<u>8/31/15, 9/28/15</u>
Co	nt. from 05041	5.	All fiells waive boria.	As of 12/21/15, nothing further has
	2015, 083115,	,	Full IAEA – ok	been filed. The following issues
1 1	2815		I OII I/ LE/ C	remain:
	Aff.Sub.Wit.		Decedent died intestate	SEE PAGE 2
>	Verified		D. M. C.	
	Inventory		Residence: Fresno	
	PTC		Publication: Business Journal	
	Not.Cred.		Estimated value of estate:	
	Notice of	Χ	Personal property: \$1,000.00	
	Hrg		Real property: \$155,000.00	Note: If granted, the Court will set
	Aff.Mail	Х	Total: \$156,000.00	status hearings as follows:
~	Aff.Pub.		D. J. D. C. D. J. D. J. D. J. D. J. D. J. D. D. J. D. J. D. J. D. J. D. J. D. J. D.	
	Sp.Ntc.		Probate Referee: Rick Smith	Monday, June 6, 2016 for filing the Inventory and Appraisal
	Pers.Serv.			me inveniory and Applaisar
	Conf.			Monday, March 6, 2017 for
	Screen			filing the first account or
>	Letters			petition for final distribution.
~	Duties/Supp			
	Objections			If the proper items are filed prior to the status hearing dates
	Video			pursuant to Local Rule 7.5, the
	Receipt			status hearings may come off
	CI Report			calendar.
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			<b>Reviewed on:</b> 12/21/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 17 - Padilla

#### Page 2 - NEEDS/PROBLEMS/COMMENTS:

Examiner Notes previously noted the following issue:

1. Declaration of Michelle Nino filed 8/17/15 states she is one of two children of the decedent and waives NOTICE and also waives ANY INTEREST in the estate.

Ms. Nino's declaration appears to be an irrevocable disclaimer of interest as discussed in Probate Code §§ 265, 275 et sea.

Pursuant to Probate Code §282, a disclaimer, when effective, is irrevocable and binding, and the disclaimed interest shall descend to the issue of the disclaimant as if the disclaimant had predeceased the decedent.

<u>Therefore, need clarification</u>: Does Ms. Nino have issue that will now be heir(s) to her share of the estate? If so, need their information pursuant to #8 of the petition, and need waivers of bond from them. Note that bond cannot be waived if there are minor heirs.

On 9/22/15, Petitioner filed a Declaration noting that Probate Code §282(b)(1) contains an exception to the above-referenced situation, and states that if the beneficiary is not treated as having predeceased the decedent, there is no problem or issue as suggested and the case can go forward with his appointment as administrator and the probate case can proceed to its proper completion.

#### **Examiner notes as follows:**

#### §282(b)(1) states:

- (b) Notwithstanding subdivision (a), where the disclaimer is filed on or after January 1, 1985:
- (1) The beneficiary is not treated as having predeceased the decedent for the purpose of determining the generation at which the division of the estate is to be made under Part 6 (commencing with Section 240) or other provision of a will, trust, or other instrument.

#### §240 states:

240. If a statute calls for property to be distributed or taken in the manner provided in this section, the property shall be divided into as many equal shares as there are living members of the nearest generation of issue then living and deceased members of that generation who leave issue then living, each living member of the nearest generation of issue then living receiving one share and the share of each deceased member of that generation who leaves issue then living being divided in the same manner among his or her then living issue.

This exception has to do with level of division of shares, and not with who is entitled to take pursuant to disclaimers.

As explained in the annotated code commentary: This provision is designed to prevent an heir from disclaiming for the purpose of increasing the share of his or her line at the expense of the other line of descendants. For example: If the decedent had two children, one deceased with one child, and the other living with three children, the level of division remains at the child level (one-half shares). If the living child disclaims, the division remains in one-half shares, and does <u>not</u> revert to one-quarter shares because of the disclaimer at the expense of the child of the deceased heir. The deceased child's heir would still be entitled to his parent's one-half share, and the disclaimant's three children would then split their parent's one-half share.

<u>Therefore, the section Petitioner cites does not apply to Petitioner's situation, and the issue above remains noted. If Ms. Nino's declaration is deemed a disclaimer by the Court, then need information regarding her issue for #8 of the petition and waivers of bond from all new heirs, or bond of \$156,000.00.</u>

## 18 In Re: The Restated Campbell Family Trust Case No. 15CEPR00474

Attorney
Attorney
Schorling, Douglas D. (for Kevin S. Campbell – Beneficiary – Petitioner)
Roberts, Gregory J. (for Billie J. Campbell – Trustee – Respondent)
Petition to Compel Trustee to Account

Jerry W. 0 DOD: 8/4	Campbell 1/00	REVIN S. CAMPBELL, Beneficiary, is Petitioner.  Petitioner he is a beneficiary of The Restated Campbell Family Trust (The Trust) executed by JERRY W. CAMPBELL and BILLIE J. CAMPBELL on 3/16/95. The trust provides that	NEEDS/PROBLEMS/ COMMENTS:  Minute Order 10/19/15: Mr. Schorling represents that Mr. Roberts has provided a report
	n: 062215,	upon the death of the first Trustor, the trust	which is being reviewed by an
070615, 0	)81715 <i>,</i>	estate is to be divided into three trusts:	accountant. Counsel requests
101915	ub.Wit.	Trust A, the Jerry W. Campbell Family Trust; Trust B, the Billie J. Campbell Family Trust; and	60 days. If the matter is not resolved, a status report
		Trust C, the Campbell QTIP Trust	verified by Kevin Campbell is
✓ Verifi			to be filed at least two court
Inver	ntory	The Trust appoints BILLIE J. CAMPBELL as	days prior to 1/4/16.
PTC		trustee of all three trust, and appoints the	A
Not.0		trustors' two sons, RANDALL D. CAMPBELL (DOD 1/4/07) and RICKY D. CAMPBELL (DOD	As of 12/21/15, nothing further has been filed.
│ ✓ │ Notic │ │ │ Hrg	ce of	4/20/09), and	nas been mea.
✓ Aff.M	Nail w	<b>DAVID ASH</b> as successor co trustees. As a	Note: Declaration of Douglas D.
Aff.Pu		result of the deaths of Randall D. Campbell	Schorling in Response to
Sp.N		and Ricky D. Campbell, David Ash is the sole successor trustee.	Response to Petition was filed 6/29/15. See additional pages.
Pers.		300003301 1103100.	0/27/13. See additional pages.
Conf		It is unclear to Petitioner whether Billie J.	Petitioner provides names
Scree		Campbell is still the trustee of the trusts. It is	and addresses of the "other
Lette	ers	possible that she has resigned or has appointed David Ash as a co-trustee.	beneficiaries;" however, Probate Code §17201
Dutie	es/Supp	appointed bavia / 3/1 as a co mostee.	requires the petition to list of
✓ Obje	ections	The trustors are also the trustors of	each person <u>entitled to</u>
Vide	-	The Jerry W. Campbell and Billie J. Campbell	<u>notice</u> . Need complete list
Rece		Irrevocable Trust dated 3/28/91. DAVID ASH is the trustee of the Irrevocable Trust.	of each person entitled to notice in this proceeding,
CI Re		is the hostee of the mevocable host.	including Petitioner's own
9202		Petitioner believes it is possible that Billie J.	information.
│ ✓ │ Orde	er	Campbell and David Ash have commingled	
		assets between the Trust and the Irrevocable Trust.	2. Notice of Hearing filed 6/3/15 indicates service
		11051.	mailed on <u>July 29, 2015</u> .
		Paragraph 2.1 of Section V of the Trust	Need amended Notice of
		specifically requires the trustee to account.	Hearing reflecting the
		Neither Billie J. Campbell nor David Ash has	correct service date.
∆ff Þ	osting	made any report of information about the Trust nor any account of the Trust.	Reviewed by: skc
	us Rpt		Reviewed by: 3RC
UCC		On 8/28/14, Petitioner mailed by certified	Updates:
Citat		mail a written demand for documentation including annual accountings, information	Recommendation:
	lotice	under Probate Code §16060, 16061, 16060.7.	File 18- Campbell
		31000,1000,1000,1000,1000,1000,1000,100	
		SEE ADDITIONAL PAGES	

#### Page 2

**Petitioner states** the trustee has failed and refused to prepare and provide Petitioner with the requested account and has failed and refused to Provide Petitioner with any of the requested information and documentation. In addition, the Trustee never provided Petitioner with the required notice under § 16061.7 upon the death of Jerry W. Campbell.

Attached to the petition are the Exhibit A – Restated Campbell Family Trust dated 3/16/95, Petitioner's Letter dated 8/28/14, and the certified mail return receipt for the Letter.

#### Petitioner prays for an order:

- 1. Compelling Billie J. Campbell and/or David Ash to prepare and file with this Court an account of the Trust since its commencement on 3/28/91, including copies of any and all documents that support, substantiate, or evidence any item set forth in the accounting. See petition for specifics re requested documentation:
- 2. Instructing Billie J. Campbell and/or David Ash to petition this Court for the settlement of the account and give notice of hearing on the petition;
- 3. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with all information necessary under §06060 to keep the beneficiaries reasonably informed of the trust and its administration;
- 4. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with information under §16061 to report to the beneficiary by providing the requested information relating to the administration of the trust relevant to the beneficiary's interest;
- 5. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with the terms of the Trust, as required by §16060.7;
- 6. For such attorney fees and costs as may be allowable by law; and
- 7. For all other orders the court deems proper.

#### Response filed 6/8/15 by BILLIE J. CAMPBELL states:

- Respondent is the sole beneficiary and currently acting sole trustee of Trust B with power to amend and/or revoke Trust B, and as trustee, no duty to account to any other person of the financial transactions of Trust. B.
- No Trust C (QTIP Trust) was established pursuant to the death of Jerry W. Campbell as the trust had insufficient assets to require such establishment.
- Trust A was not subdivided into "Exempt Family Trust A" and "Non-Exempt Family Trust A" because there were no generation-skipping issues which would require such subdivision. Respondent is the lifetime sole beneficiary of Trust A and unless as trustee she determines to make discretionary distributions to others, the lifetime sole principal beneficiary of Trust A, the intention of Jerry W. Campbell being to provide first for the needs of his surviving spouse (see Trust). There is no distribution of Trust A assets required to be made to any beneficiary other than Respondent until Trust A is divided into separate shares upon her death.

#### **SEE ADDITIONAL PAGES**

## 18 In Re: The Restated Campbell Family Trust Case No. 15CEPR00474

#### Page 3

**Respondent states** the duty of the trustee to account is to the beneficiaries of "their trust." Until the death of Respondent, no trusts are established for any beneficiaries other than Respondent. Consequently, Trustee currently has no duty to account to anyone other than Respondent of the transactions of any trust established under the Restated Campbell Family Trust.

To Respondent's belief, the administration of the Irrevocable Trust, of which Respondent was not a trustee, has been concluded.

Respondent has had to retain counsel to file this response and asks the Court to order Petitioner to reimburse the costs and fees incurred, as proven upon subsequent declaration of Gregory J. Roberts.

#### Respondent prays for an order:

- 1. That Respondent is the sole beneficiary of Trust B entitled to an accounting;
- 2. That Respondent was never a trustee of the Irrevocable Trust and has no obligation to account or participate in any accounting;
- 3. That Petitioner shall reimburse Respondent for the costs and attorney's fees she has incurred; and for
- 4. Such other and further relief as the Court deems proper.

<u>Examiner's Note</u>: The Irrevocable Trust is not before the Court at this time; therefore, the Court cannot make orders regarding Respondent's obligations in connection with the Irrevocable Trust.

Declaration of Douglas D. Schorling in Response to Response to Petition to Compel Trustee to Account filed 6/29/15 states under Probate Code §24, a "beneficiary" as it relates to a trust means a person who has any present or future interest, vested or contingent. Petitioner is clearly a beneficiary and is entitled to all of the rights granted to a beneficiary under the Probate Code. In her response, the trustee admits that Trust A is irrevocable, but take the position that the trustee has no duty to account because she is still alive. Not only is the trustee's position contrary to California law, it also ignores the fact that Petitioner has requested more than an accounting. Petitioner has requested the information to which he is entitled pursuant to §16060, 16060.7, 16061, and 16061.5. The trustee has also failed to provide notification as required by §16061.7 and is therefore liable under §16061.7 for all damages, attorney's fees, and costs caused by that failure. See declaration for authority. Declaration states Petitioner is entitled to the relief requested in the petition.

Petitioner is also sensitive to the fact that the trustee, who is his grandmother, apparently feels burdened by Petitioner's requests. Consequently, Attorney Schorling has advised counsel for the trustee that Petitioner is willing to forego an official accounting if the trustee is willing to provide the other information and documentation requested. To the extent any of the requested information is also available to third parties, such as financial institutions, the trustee is free to have the information provided directly to petitioner by such third parties rather than providing herself.

Attorney Susan K. Arthur (for Petitioner Kevin L. Barnes)

First Amendment to First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Compensation for Ordinary and Extraordinary Services, and for Final Distribution

	DOD: 11/7/0014 VEVIN L. DADNIES and gird Fire circles in			
<u> </u>	OD: 11/7/2014	<b>KEVIN L. BARNES</b> , son and Executor, is	NEEDS/PROBLEMS/COMMENTS:	
Co	ont. from Aff.Sub.Wit. Verified Inventory	Petitioner.  Account period: 11/7/2014 - 10/30/2014 Accounting - \$117,988.67 Beginning POH - \$110,250.00 Ending POH - \$17,128.95 (all cash)  Executor - \$4,532.16 (statutory)	1. CA Rule of Court 7.53(a) provides an amendment to a pleading requires the same notice of hearing as the pleading it amends. Need Notice of Hearing and proof of service of notice for the First Amendment to First and Final Account, etc., filed 12/3/2015 pursuant to § 11000 for settlement of the account.	
✓	PTC	,,	2. Paragraph 24 of the Petition	
✓	Not.Cred.	Executor XO - \$1,000.00 (Per Declaration attached as Exhibit I;	requests the Petitioner be paid	
<b>\</b>	Notice of W Hrg /	for sale of real property, per Local Rule 7.18(B)(1); not requesting	\$1,000.00 for extraordinary services in connection with the sale of real	
	Aff.Mail	compensation for 182.2 hours of time	property, pursuant to Local Rule	
	Aff.Pub.	expended for benefit of estate;)	7.18(B), which appears proper. In addition, Paragraph 25 of the	
	Sp.Ntc.	Attorney - <b>\$4,532.16</b>	Petition requests the attorney be	
	Pers.Serv.	(statutory)	paid <b>\$1,000.00</b> for extraordinary	
	Conf.	(3/4/3/3/7)	services in connection with the sale	
	Screen	Attorney XO - \$1,000.00	of real property pursuant to Local	
	<b>Letters</b> 061815	(Local Rule 7.18(A) for sale of real	Rule 7.18(A), which allows such fee for court-confirmed sales of real	
	Duties/Supp	property – see note at right;)	property. However, the distinction of	
	Objections	Executor Costs - \$1,131.25	court confirmation of the sale does	
	Video	(filing fee, probate referee,	not apply to the sale of the real	
	Receipt	publication, certified copies)	property of the instant estate, as it	
	CI Report	· · ·	was sold pursuant to the Notice of	
✓	9202	Distribution pursuant to Decedent's Will is to:	Proposed Action filed 8/17/2015 by Petitioner under IAEA authority	
1	Order	15 10.	without court confirmation. Court	
		KEVIN L. BARNES – \$2,466.19 cash;	may require declaration in support of the attorney's extraordinary fee	
		WESLEY ABBEY – \$2,466.19 cash.	request pursuant to CA Rule of Court 7.702 - 7.703	
	Aff. Posting		Reviewed by: LEG	
	Status Rpt		<b>Reviewed on:</b> 12/17/15	
	UCCJEA		Updates:	
	Citation		Recommendation:	
✓	FTB Notice		File 19- Barnes	
			10	

#### Illiana Manriquez (GUARD/P) Case No. 15CEPR00884 20

Petitioner Manriquez, Karen P. (Pro Per – Paternal Grandmother)

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 11/16/15	NEEDS/PROBLEMS/COMMENTS:
		IEWITOKAKI EAFIKES 11/10/13	INCEDS/FROBLEIVIS/CONVINCENTS.
Cont	from 111615	<b>KAREN P. MANRIQUEZ</b> , Paternal Grandmother, is Petitioner.	OFF CALENDAR. Order granting continuance to 1/5/16 signed on 12/17/15.
	ff.Sub.Wit.	Please see Petition for details	
	erified	riease see reilion foi details	Minute Order of 09/22/2015 (Temporary
In	ventory		Hearing): Ms. Forker is to properly serve the declaration she filed. The Court
PT	TC		orders visitation for Ms. Forker every
N	ot.Cred.		Tuesday and every Saturday from 6pm to
•	otice of rg		7pm at the McDonald's at Willow and Nees, starting tonight.
✓ At	ff.Mail		1. Need proof of service fifteen (15)
A	ff.Pub.		days prior to the hearing of the
Sp	p.Ntc.		Notice of Hearing along with a
✓ Pe	ers.Serv.		copy of the Petition for Appointment of Guardian or
	Conf.		consent and waiver of notice or
$\vdash$	etters		declaration of due diligence for: • Paternal Grandfather (Not
✓ Di	uties/Supp		Listed)  2. Notice of Appearance of Counsel on
0	)bjections		Behalf of Karen P. Manriquez filed on
Vi	ideo		11/13/2015 by Attorney Jay A.
Re	eceipt		Christofferson states he is counsel of record for petitioner. Need
<b>√</b> C	I Report		Substitution of Attorney on
92	202		Mandatory Judicial Council Form –
-	Order		MC 050.
			As to Courtney D. Forker, Mother:
			1. Need proof of service regarding declaration filed on 09/21/2015 pursuant to Minute Order of 09/22/2015.
A	ff. Posting		Reviewed by: L∨
St	tatus Rpt		<b>Reviewed on:</b> 11/12/2015
<b>√</b> U	CCJEA		Updates:
<del>                                   </del>	itation		Recommendation:
FT	TB Notice		File 20- Manriquez

Lee, Jackie Eileen (Pro Per – Daughter – Petitioner)

Petition to Determine Succession to Real Property (Prob. Code §13150)

DO	D: 8/1/15	JACKIE EILEEN LEE, Daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Co	nt'd from: )215  Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail w/o  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters	40 Days since DOD  No other proceedings  I&A: \$95,160.00 (\$60.00 cash plus a 100% interest in real property located at 3949 E. Lowe in Fresno and two vehicles)  Will dated 12/8/09 (witnessed 1/19/10) is a California Statutory Will that devises the residence as a specific gift to Petitioner Jackie Eileen Lee, \$20.00 each to Michael Lee, Todd Lee, Willie Lee, Jr., Billy Lee, and Edward Lee, and the balance to Jackie Eileen Lee.  Petitioner requests Court determination that the real property passes to her pursuant to the Decedent's will.  Petitioner filed a Declaration on 11/2/15 in response to Examiner Notes. Petitioner states if	
	Duties/Supp	the Court requires a filing fee, Petitioner	
	Objections	requests she be allowed to make payments.  Petitioner states the Examiner Notes are	
	Video Receipt	incorrect and that §13151 allows a successor to petition re the real property only without	
	CI Report	succession to personal property, and	
	9202	Petitioner purposely did not include any	
~	Order	request for succession to the personal	
	Aff. Posting	property. Those entitled to personal property can use an affidavit under §13100 to collect	Reviewed by: skc
	Status Rpt	the personal property. No court order under	Reviewed on: 12/22/15
	UCCJEA Citation	this section is required. Petitioner states she has	Updates:
	FTB Notice	submitted a declaration regarding efforts to	Recommendation: File 21 – Lee
	I ID NOICE	try to locate addresses for the missing heirs. (See Declaration filed 10/15/15.)	THE ZI - LEE

#### Page 2 – NEEDS/PROBLEMS/COMMENTS:

- 1. <u>Examiner Notes previously stated</u>: This petition was filed with a fee waiver. If assets are distributed pursuant to this petition (Estate value \$95,160.00), the filing fee of \$435.00 will be due prior to distribution. *Declaration filed* 11/2/15 requests to be allowed to make payments.
- 2. Examiner Notes previously stated: The I&A includes cash, real property, and two vehicles. Attachment #11 requests only that the real property pass to Petitioner pursuant to the will. However, this leaves the cash bequests and vehicles outstanding. In this type of summary proceeding, all successors in interest must petition together for determination of the assets they are entitled to, and determination is made in one order. Assets cannot be left outstanding.

Therefore, an amended petition together with Michael Lee, Todd Lee, Willie Lee, Jr., Billy Lee, and Edward Lee may be necessary.

Alternatively, the Court may accept written receipts from the above people for their \$20 bequests.

**Declaration filed 11/2/15 states** the above Examiner's Note misstates the law and is incorrect. Probate Code §13151 states only the successor to a particular item of property that is real property needs to petition the court. This petition may include personal property, but that is not required. Petitioner is only the successor to the real property which is specifically devised to her. She purposefully did not include any request for succession to any item of personal property. Those entitled to personal property can use an affidavit under §13100 to collect the personal property. It is not required to be included in this petition.

<u>Examiner's Note</u>: Examiner is not aware of any authority for leaving known, inventoried assets outstanding and granting only succession to the real property, as Petitioner suggests. Here, the bank account and two vehicles\* (\*see #3 below) have been inventoried and as such are before the Court.

- 3. <u>Upon further review</u>: Item No. 3 of the I&A Attachment No. 2 is <u>not actually a vehicle</u>, but rather appears to be a <u>loss claim</u> on a vehicle with the loss dated 1/29/15 (<u>after</u> the decedent's death). The Court may require further clarification regarding this inventory item. Note that the Inventory and Appraisal should provide date of death values for all assets.
- 4. **Petitioner's Declaration filed 11/2/15 states** she does not, and is not required to, request determination of succession to any of the personal property assets. However, Examiner notes that pursuant to the will, *Petitioner is the successor* to both the real <u>and personal property</u>. Therefore, need authority for specifically omitting known, inventoried assets that would pass to <u>this petitioner</u> under the will from this petition and order.
- 5. **Petitioner states** the addresses of the following relatives, one of whom is an heir, are unknown: Billy Lee, Jr., and Bertha Louise Lee. As noted above, the Court may require all heirs to participate in the petition, or may require a receipt from Billy Lee, and may require notice to Billy Lee and Bertha Louise Lee. **Declaration filed 11/2/15 refers to Declaration of Due Diligence filed 10/15/15.**
- 6. <u>Upon further review</u>: It does not appear that Jamie Davis Myers Bennett, who is a named Alternative Executor, was given notice of the hearing. Need notice to Jamie Davis Myers Bennett pursuant to Probate Code §§13153, 13152(a)(7).

Also, "Eddie Lee" is the second named Alternative Executor. Is this the same person as "Edward Lee," who is a beneficiary of a cash bequest under the will?

## 22 Brooke Romero, Micah Romero (GUARD/PE) Case No. 15CEPR01031

Petitioner Thomas, Karen Mae (Pro Per – Maternal Grandmother)
Petitioner Thomas, Gerald L (Pro Per – Maternal Step-Grandfather)

Petition for Appointment of Guardian of Person and Estate

Bro	oke Age: 17	TEMPORARY (PERSON ONLY) EXPIRES	NEEDS/PROBLEMS/COMMENTS:
	cah Age: 16	01/04/2016	, , , , , , , , , , , , , , , , , , , ,
	<u> </u>	=	Minute Order of 10/28/2015: Examiner
		KAREN THOMAS, maternal grandmother,	notes provided in open court; defects are
Co	nt. from	and <b>GERALD THOMAS</b> , maternal step- grandfather, are petitioners.	to be cured before the general hearing.
	Aff.Sub.Wit.	grandrainer, are permoners.	The following issues have not been
1	Verified	Please see petition for details	rectified:
	Inventory	= =	General Petition indicates that
	PTC		Guardianship of the Estate is
	Not.Cred.		requested however the estimated
	Notice of		value of the estate is zero. Petitioners
	Hrg		do not provide any information regarding the reasons why a
	Aff.Mail		Guardianship of the Estate is needed.
	Aff.Pub.		Need clarification.
	Sp.Ntc.		<b>Note:</b> If a Guardianship of the Estate is
	Pers.Serv.	<u>(</u>	requested then a separate Petition and
1	Conf.		Case file for each child is required for
	Screen		Guardianship of the Estate.
✓	Letters		2. Need Notice of Hearing.
	Duties/Supp		2. No ed pro et et personal ser ice fifte en
	Objections		3. Need proof of personal service fifteen (15) days prior to the hearing of the
	Video		Notice of Hearing along with a copy
	Receipt		of the Petition for Appointment of
	CI Report		Temporary Guardian or consent and
<b> </b>	9202		waiver of notice or declaration of
✓	Order		due diligence for:
			Jacqueline Renee Clark  (Mathor)
			(Mother)  • Brooke Romero (Minor)
			Micah Romero (Minor)
			<u>Please see additional page</u>
	Aff. Posting		Reviewed by: LV
	Status Rpt	_	<b>Reviewed on:</b> 12/17/2015
✓	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 22- Romero
			00

# 22(additional page) Brooke Romero, Micah Romero (GUARD/PE) Case No. 15CEPR01031

- 4. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
  - Paternal Grandparents
  - Maternal Grandfather
  - Any siblings 12 and older
- 5. Need Guardianship Petition-Child Information Attachment, Mandatory Judicial Council Form GC-210(CA), for each child.
- 6. UCCJEA is incomplete. Need minors' residence information for the past 5 years.

Petitioner

23

BENJAMIN, GLENDA FAYE (pro per – maternal grandmother)

#### Petition for Appointment of Guardian of the Person

Ag	Age: 7		TEMPORARY EXPIRES 01/04/16	NEEDS/PROBLEMS/COMMENTS:
			<b>GLENDA FAYE BENJAMIN,</b> maternal grandmother, is Petitioner.	Need proof of service at least 15 days before the hearing of Notice of
Co	ont. from Aff.Sub.Wit. Verified		Father: MICHAEL COWARD – personally served on 10/31/15  Mother: LATRESE BENJAMIN	Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent
	PTC Not.Cred.		Paternal grandfather: FRANCIS COWARD – served by mail on 12/17/15 Paternal grandmother: BERTHA COWARD –	& Waiver of Notice <u>or</u> Declaration of Due diligence for: a. Latrese Benjamin
	Notice of Hrg Aff.Mail Aff.Pub.	X	served by mail on 12/17/15  Maternal grandfather: VIRGIL BENJAMIN – Consents and Waives Notice	(mother) – personal service required
✓ ✓	Sp.Ntc. Pers.Serv.	w/	Petitioner states [see file].	
<b>V</b> ✓	Conf. Screen		Court Investigator Samantha Henson filed a report on 12/18/15.	
✓ ✓	Letters Duties/Supp			
	Objections Video Receipt			
<b>√</b>	CI Report			
✓	Order Aff. Posting			Reviewed by: JF
✓	Status Rpt UCCJEA Citation			Reviewed on: 12/17/15 Updates: 12/21/15; 12/28/15
	FTB Notice			Recommendation: File 23- Coward

## Kymandre Norman (GUARD/P) Case No. 15CEPR01036

Franklin, Andrea (pro per – maternal grandmother)

#### Petition for Appointment of Guardian of the Person

Ag	e: 6	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		ANDREA FRANKLIN, maternal grandmother, is Petitioner.	Need Notice of Hearing.
Co	nt. from	Father: <b>IKE NORMAN</b>	Need proof of service at least     15 days before the hearing of     Notice of Hearing with a copy
✓ ————————————————————————————————————	Aff.Sub.Wit.  Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail	Petitioner states [see file].  Court Investigator Julie Negrete filed a	of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Ike Norman (father) – personal service needed b. Aunjeli Kingsbury (mother) – personal service needed
✓ ✓ ✓	Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	report on 12/22/15.	c. Paternal grandfather – service by mail ok d. Kim Norman – service by mail ok e. Eric Kingsbury (maternal grandfather) – service by mail ok
	Aff. Posting Status Rpt		Reviewed by: JF Reviewed on: 12/18/15
<b>✓</b>	UCCJEA Citation FTB Notice		Updates: 12/22/15 Recommendation: File 24- Norman
<u> </u>			

Moreno, Jacibe Yasmin (pro per – maternal grandmother)

## Petition for Appointment of Guardian of the Person

Age: 1			NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
			JACIBE YASMIN MORENO, maternal grandmother, is petitioner.	3. Need Notice of Hearing.
Cont. from			Father: <b>UNKNOWN</b>	4. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy
	Aff.Sub.Wit.		Mother: LUZ CERVANTEZ MORENO	of the Petition for
✓	Verified			Appointment of Guardian of
	Inventory		Paternal grandparents: UNKNOWN	the Person <u>or</u> Consent &
	PTC		   Maternal grandfather: UNKNOWN	Waiver of Notice <u>or</u> Declaration of Due Diligence
	Not.Cred.		Material granatamer. onkinowin	for:
	Notice of	Х	Petitioner states [see file for details].	f. Father – personal service
	Hrg			needed
	Aff.Mail	Χ	Court Investigator Jennifer Daniel filed a	g. Luz Cervantez Montes
	Aff.Pub.		report on 12/11/15.	(mother) – personal service needed
	Sp.Ntc.			h. Paternal grandparents –
	Pers.Serv.	Χ		service by mail ok
✓	Conf.			i. Maternal grandfather –
	Screen			service by mail ok
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video			
Ļ	Receipt			
✓	CI Report			
	9202			
<b>✓</b>	Order			
	Aff. Posting			Reviewed by: JF
<b>✓</b>	Status Rpt			<b>Reviewed on:</b> 12/18/15
<u> </u>	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 25- Moreno

**Attorney** 

Leigh W. Burnside; Summer A. Johnson (for Petitioners James Bedrosian, Jane Bedrosian, and Paul Bedrosian)

## Petition for Appointment of Probate Conservator

			NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
			JAMES KENNETH BEDROSIAN, father, JANE S. BEDROSIAN, mother, and PAUL DAVID BEDROSIAN, brother, are Petitioners and	Need Conservatorship     Video Viewing Certificate     pursuant to Local Rule
Со	nt. from		request appointment as <u>Limited</u> Co-	7.15.9(A).
	Aff.Sub.Wit.		Conservators of the Person, with orders relating	
✓	Verified		to the powers and duties of the proposed Limited Conservators under Probate Code §	
	Inventory		2351.5 be granted, and orders limiting the civil	
	PTC		and legal rights of the proposed Limited	
	Not.Cred.		Conservatee.	
✓	Notice of Hrg			
✓	Aff.Mail	W/	~Please see Petition for details~	
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.		Court Investigator's Report was filed 12/18/2015.	
✓	Conf. Screen		12/10/2013.	
✓	Letters			
<b>√</b>	Duties/Supp			
	Objections			
	Video Receipt	Χ		
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			<b>Reviewed on:</b> 12/17/15
	UCCJEA			<b>Updates:</b> 12/21/15
✓	Citation			Recommendation:
	FTB Notice			File 26- Bedrosian

## 27 Gerald House (Det. Succ) Case No. 15CEPR01146

Attorney Lyon, Robirda M (for Dana House Trustee of Gerald House Family Trust – Petitioner)

Petition to Determine Succession to Real Property

DOD: 07/14/2005			DANA HOUSE, TRUSTEE OF THE GERALD	NEEDS/PROBLEMS/COMMENTS:
			HOUSE FAMILY TRUST, is petitioner.	
			40 days since DOD	Pursuant to Probate Code §13152(c)     a <u>copy</u> of the will must be attached to the petition, however the original
Со	nt. from		No other proceedings	will is attached. Original will is
	Aff.Sub.Wit.	s/p	·	required to be deposited with the
<b>√</b>	Verified		I&A - \$22,500.00	Clerk's office pursuant to Probate Code 8200.
✓	Inventory		Will dated: 01/21/2000 devises real	
	PTC		property pass to the Gerald House Family Trust	Need Declaration pursuant to     Local Rule 7.12.5 regarding
	Not.Cred.		Tarriny 11031	distribution to Intervivos Trust.
✓	Notice of Hrg		Petitioner requests Court determination that decedent's 25%	
<b>✓</b>	Aff.Mail	w/	interest in real property located at	
	Aff.Pub.		10744 Estrella St., Del Rey, Ca. pass to the Gerald House Family Trust	
	Sp.Ntc.		pursuant to decedent's will.	
	Pers.Serv.		'	
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202	1		
<b>√</b>	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			<b>Reviewed on:</b> 12/21/2015
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 27- House

## 28 Kaylee Petrochilos (GUARD/P)

Case No. 15CEPR01188

Petitioner Thompson, Richard (Pro Per – Great Uncle)
Petitioner Thompson, Heather (Pro Per – Aunt)

Petition for Appointment of Temporary Guardian of the Person

Age: 1			GENERAL HEARING 02/08/2016		EDS/PROBLEMS/COMMENTS:
7.9	<u> </u>		OENERAL HEARING 02/00/2010	'	LEBS, I ROBLEMS, COMMENTS.
			RICHARD THOMPSON, great uncle, and HEATHER THOMPSON, aunt, are	1.	Need Notice of Hearing.
	Cont. from		petitioners.	2.	Need proof of personal service
<u> </u>			Dia		five (5) days prior to the hearing
1	Aff.Sub.Wit. Verified		Please see petition for details		of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or
	Inventory				consent and waiver of notice or
	PTC				declaration of due diligence for:
	Not.Cred.				<ul> <li>Mark Clemens Petrochilos</li> </ul>
	Notice of	Х			(Father)
	Hrg			3	UCCJEA is incomplete. UCCJEA
	Aff.Mail	n/a		٥.	provides the child's residence
	Aff.Pub.				from 2015 to present. Child was
	Sp.Ntc.				born 09/20/2014, need residence
	Pers.Serv.	Х			since birth.
1	Conf.				
	Screen				
✓	Letters				
1	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting			Re	viewed by: LV
	Status Rpt			Re	viewed on: 12/18/2015
✓	UCCJEA			Up	odates:
	Citation			Re	commendation:
	FTB Notice			File	e 28- Petrochilos

# 29 Ariehn Brady, Annaleah Brady, and ABCD Brady (GUARD/P) Case No. 15CEPR01190

Petitioner Julie C. Jones (Pro Per - self-represented attorney)

## Petition for Appointment of Temporary Guardian of the Person

		TEMPORARY GRANTED EX PARTE EXPIRES	NEEDS/PROBLEMS/COMMENTS:
		1/4/2016	NEEDS/FROBLEMS/COMMENTS.
		1/4/2010	Pursuant to Probate Code
		General Hearing set for 2/9/2016	2250(e), need Notice of
			Hearing and proof of five
Cont. from	<u> </u>	JULIE C. JONES, non-relative caretaker, is	(5) court days' notice by
Aff.Sub.Wit.		Petitioner.	personal service of the
✓ Verified		~Please see Petition for details~	Notice of Hearing with a
Inventory			copy of the Petition for
PTC			Appointment of
Not.Cred.			Temporary Guardian, or
Notice of	Х		Consent to Appointment
Hrg			of Guardian and Waiver
Aff.Mail			of Notice, or a
Aff.Pub.			Declaration of Due
Sp.Ntc.			Diligence for:
Pers.Serv.	Х		Ariel Urrea Nigh, mother;
✓ Conf.			<ul><li>Gene Brady, father.</li></ul>
Screen			S Corio Brady, ramor.
Letters	Χ		
✓ Duties/Supp	)		
Objections			
Video			
Receipt			
CI Report			
9202			
Order	Χ		
Aff. Posting			Reviewed by: LEG
Status Rpt			<b>Reviewed on:</b> 12/18/15
✓ UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 29- Brady

Attorney

Pascuzzi, Susan L. (for Janet S. Herman – Executor – Petitioner)

Petition for Settlement of First and Final Account; Petition for Final Distribution and for Allowance of Compensation for Ordinary Services

DOD: 2/1/15		NEEDS/PROBLEMS/COMMENTS:	
		OFF CALENDAD	
		OFF CALENDAR	
Cont'd from 1	21415	Order After Hearing 12/14/15 sign	ned
Aff.Sub.W		12/21/15.	
✓ Verified	111.		
✓ Inventory	,		
✓ PTC			
✓ Not.Cred			
✓ Notice of			
Hrg			
✓ Aff.Mail	W		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf.			
Screen			
✓ Letters			
Duties/Su	<del></del>		
Objection	ns		
Video Receipt			
CI Report	<u> </u>		
✓ 9202	<u> </u>		
✓ Order			
Aff. Postin	ng	Reviewed by: skc	
Status Rp		<b>Reviewed on:</b> 12/21/15	
UCCJEA		Updates:	
Citation		Recommendation:	
FTB Notice	e	File 30 - Herman	

## 31 George Thomas Chisum (CONS/P)

Case No. 15CEPR01205

Petitioner Chisum, Denise Georgette (Pro Per – Daughter)

Appointment Temporary Conservator Petition for Appointment of Temporary Conservator

Appoiniment tempo				1
Age: 79			GENERAL HEARING 02/10/2016	NEEDS/PROBLEMS/COMMENTS:
			<b>DENISE GEORGETTE CHISUM,</b> daughter, is petitioner and requests appointment as temporary Conservator of the	Court Investigator Advised Rights on 12/22/2015
Со	nt. from		Person.	Need proof of personal service of
<b>✓</b>	Aff.Sub.Wit.		Please see petition for details	Notice of Hearing with a copy of the temporary petition at least five court days prior to the
	Inventory			hearing on the proposed
	PTC			conservatee pursuant to Probate
	Not.Cred.			Code §2250(e).
✓	Notice of Hrg			
<b>√</b>	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	х		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report	Х		
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			<b>Reviewed on:</b> 12/22/2015
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 31- Chisum